# Employee Self Service Portal Guide

## Contents

EMPLOYEE SERVICES ..... 2
EMPLOYEE SUPPORT ..... 2
EMPLOYEE RESPONSIBILITIES ..... 2
ESS PORTAL ACCESS ..... 3
EMPLOYEE DASHBOARD ..... 3
PERSONAL DETAILS ..... 4
Bank Account Details ..... 5
Superannuation Details ..... 6
DOCUMENTS ..... 8
Payslips ..... 9
Payment Summaries ..... 10
Other Documents ..... 10
LEAVE ..... 11
Balances and Applying for Leave ..... 11
Edit or Cancel Leave Request ..... 13
TIMESHEETS ..... 14
Actions Tab ..... 15
CALENDAR ..... 16
ACCOUNT DETAILS & LOG OUT ..... 18
LAST NOTES ..... 18

## EMPLOYEE SERVICES

- Electronic Payslips emailed directly to you
- Direct Credit payments deposited in to your designated bank account
- Split payments over several bank accounts
- Superannuation Payments including Salary Sacrifice & Self-Managed Funds
- Leave Management
- Timesheet Entry
- Electronic Payment Summaries
- Licenses and Qualifications storage
- Free Online & Phone Support
- Deductions automatically paid to designated recipients e.g. loan repayments, child support, taxation etc.

## EMPLOYEE SUPPORT

1. If you have any questions about your wages, your first point of contact should always be your Manager or Supervisor. If you have any questions about your payroll processing or need assistance with your Portal or personal details, etc. please follow the steps below:
2. Send an email to support@TouchPointHCM.com.au
3. Include the following details:
    - Name
    - Email Address
    - Phone Number
    - Employer Name
    - Question
4. You will be sent confirmation of your request being received by our office.
5. Your support request will be processed and you will be contacted by a support team member.
6. If you have any issues sending your support request, please call (07) 5603 5797.

**IMPORTANT NOTES**: Please follow the steps for support carefully to have your questions answered promptly.

## EMPLOYEE RESPONSIBILITIES

- Maintain account up to date details such as bank details, superannuation funds, address, phone number etc.
- Submit Timesheets Daily (where applicable)
- Ensure required amount of annual leave has been accrued before submitting request

## ESS PORTAL ACCESS

Once your onboarding details have been processed you will automatically be sent an email from TouchPoint HCM Solutions advising you of the steps to set up your password for Employee Self-Service (ESS) Portal access. Please be advised that TouchPoint HCM Solutions does not have access to your password. If you forget your password, please click on the "I forgot my password" link on the log in page. Your username is the email address used for this initial contact.

This is the point of entry to your account linked to your payroll details. Through your portal it will be YOUR responsibility to ensure that all details are correct and up to date.

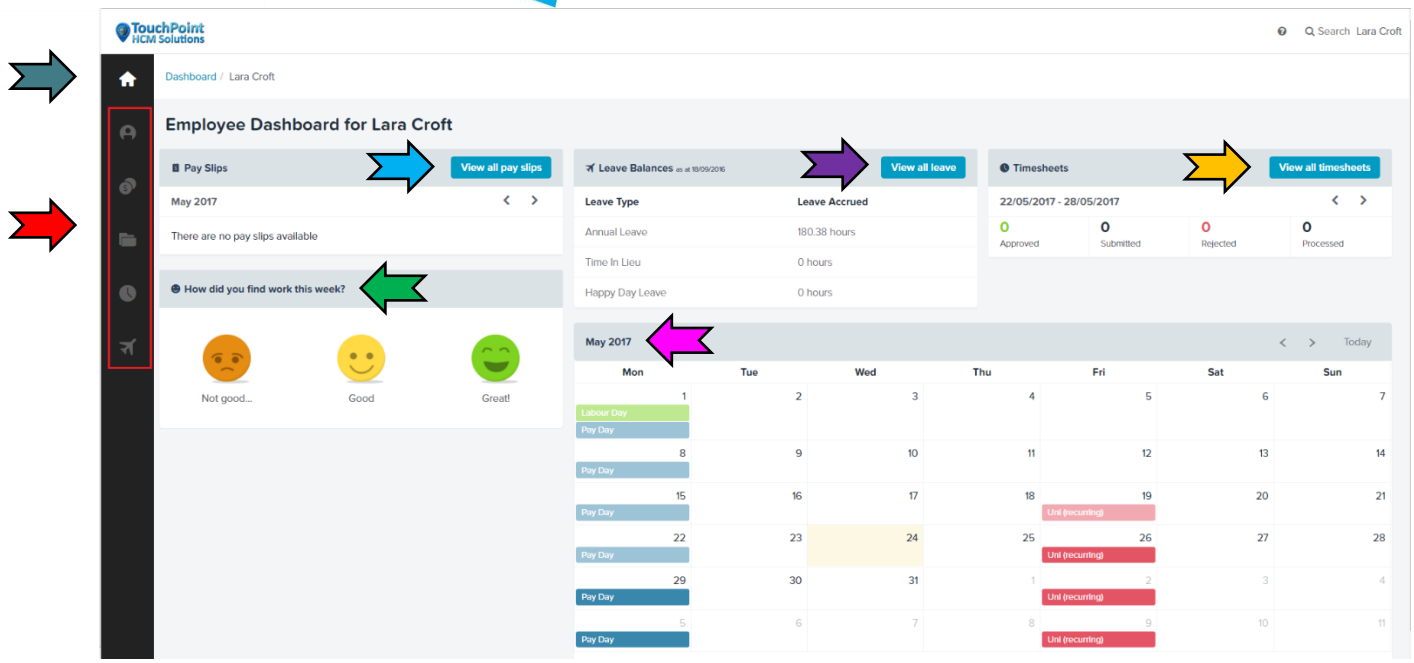
If applicable, this Portal is also where you will enter your timesheets and apply for leave (ensuring you have the required amount accrued before submitting your request).

## EMPLOYEE DASHBOARD

Once you have created your password and entered your ESS portal the page will open to the Dashboard.

The dashboard home screen displays several quick access features, such as:

- **Pay Slips** – Download your most recent payslips here. Click "view all pay slips" for previous records.
- **Leave Balances** - Leave accruals are found here. Apply for leave by clicking "view all leave".
- **Timesheets (if applicable)** – Some employees will have the option to View their timesheets, and some can enter their own. Click "view all timesheets" for more details.
- **Feedback Survey** - How did you find work this week? Simply click on the most appropriate emoticon to anonymously rate your week.
- **Calendar -** View your upcoming shifts
- **Navigation Menu –** You can also use the Menu Tabs on the left-hand side to navigate your portal and access additional features.
- You can return to the dashboard page at any time by clicking the **Home** tab at the top left of screen.



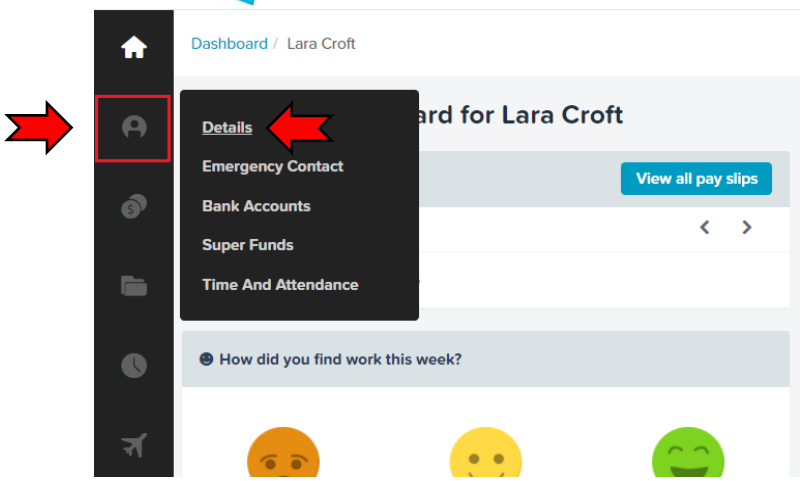

# PERSONAL DETAILS

Your details have been entered in your ESS Portal by our team, however before your first pay run is due to be processes it is recommended that you **check all your details** to ensure they are correct. If any of these details are incorrect it may result in a delay of your wages be deposited into your designated account.

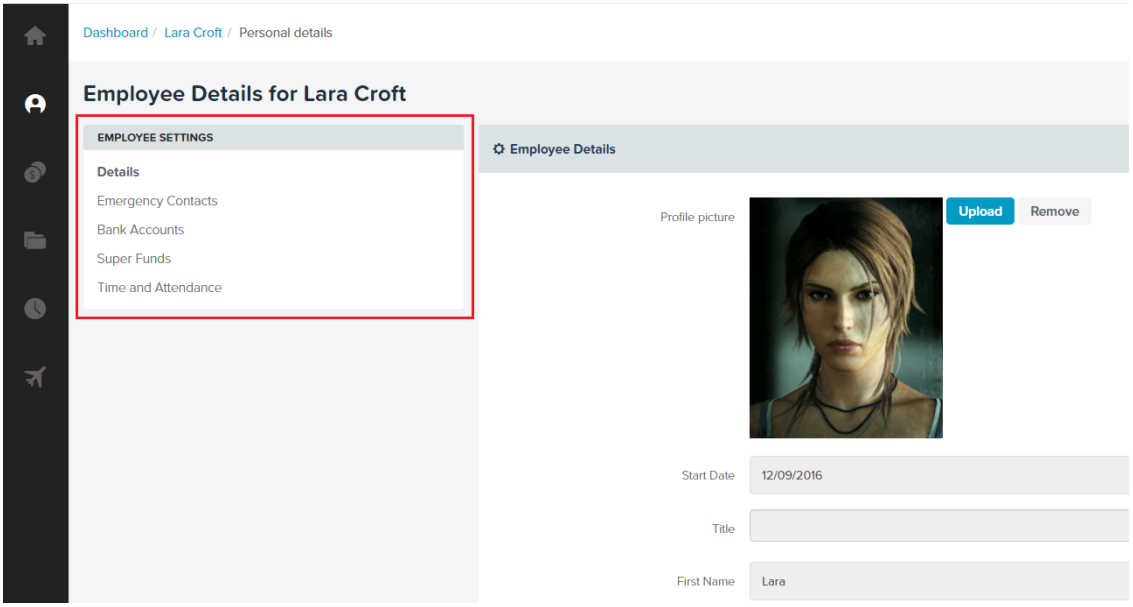
**Note:** Depending on the set-up of your employer, some of these details may not be accessible via the ESS Portal. In this case, you will need to contact TouchPoint support to update or edit your details. E.g. If you cannot see 'Super Funds' and wish to update your Superannuation details, you will need to contact support@touchpointhcm.com.au

1. Click on the "**Employee**" icon on the left-hand navigation menu of the Dashboard page.

2. A new menu will pop out with a list including (Personal) Details, Emergency Contacts, Bank Accounts, Super Funds, and Time and Attendance. Click '**Details**' to continue.



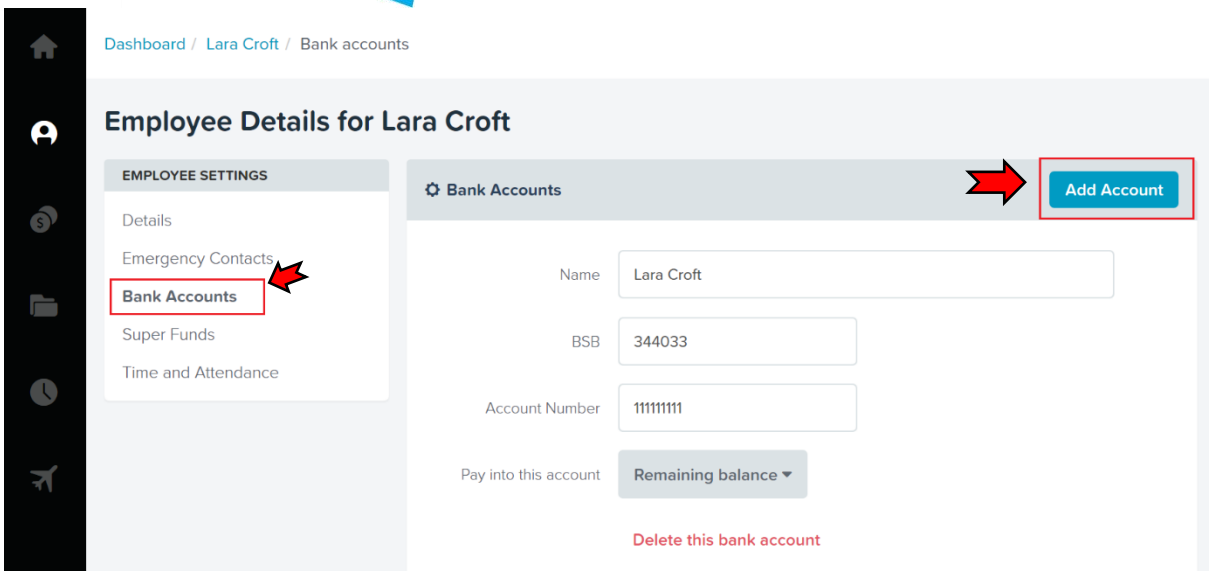

3. It is highly recommended you take the time to review the details in your employee settings. Please ensure your Emergency Contacts and Bank accounts and Super Funds details are correct. If bank details are incorrect it may result in a delay of wages being deposited to your designated account.




## Bank Account Details

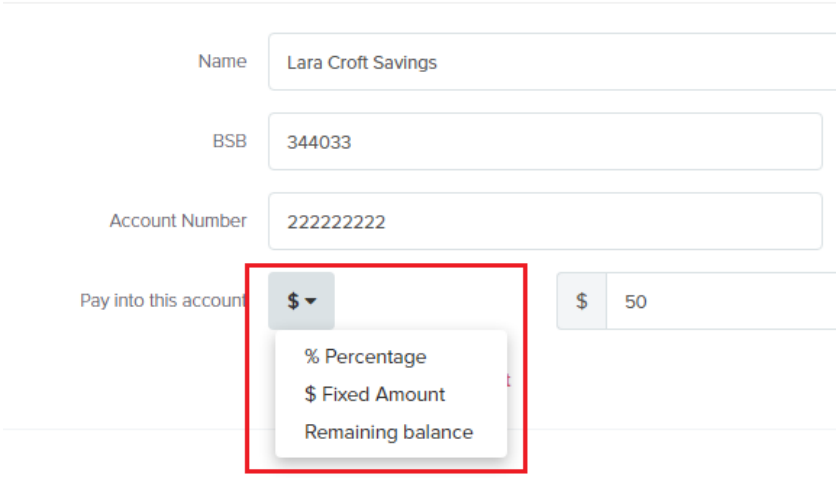
To View and Edit your Bank Account details read below. Please make sure these details are entered correctly, this is where your wages will be paid.

1. Click on the "**Bank Accounts**" tab.
2. Enter your BSB and Account Number and click **save**.
3. If you would like to have your wages split between accounts, click in the "**Add**" tab.




4. A new set of fields will appear. Enter the new account name, BSB and account number. In the "Pay into this Account" section click on the $ icon and choose from the picklist how you would like to split your wages between your accounts; enter a percentage or $ amount in the rate box.

   For Example: If you would like 10% of your wages paid into your savings account, enter the BSB and Account Number of your savings account and then select "% Percentage" and enter 10. If you want a fixed amount paid each week, select "$ Fixed Amount" and enter the dollar value. The remaining balance will be paid to your first nominated account.

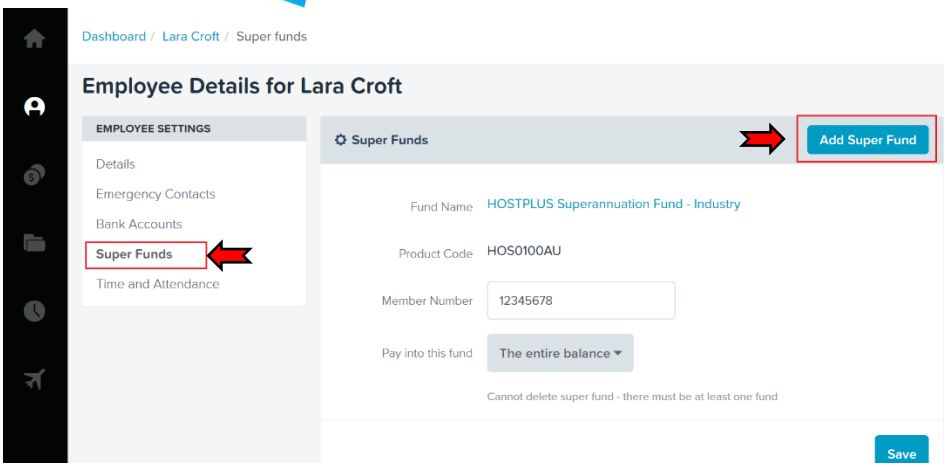



5. Once you have entered your details correctly click the "**Save**" tab.

## Superannuation Details

View and Edit your Super Fund. **Note**: If "Super Funds" is not available to you in the ESS Portal, please contact support@TouchPointHCM.com.au to update your details.

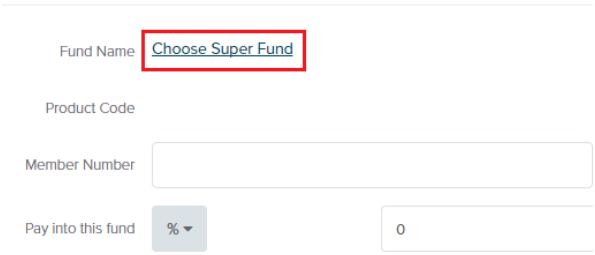
1. Click on the "**Superannuation**" tab in the Employee Settings box.



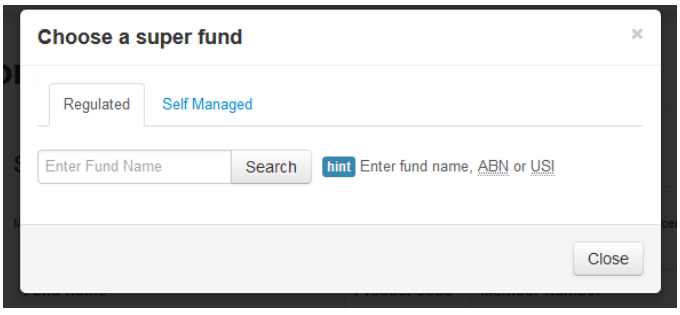

2. First ensure these details are correct. If these details are incorrect, please contact support.

   **IMPORTANT NOTE**: If you are changing superannuation funds **DO NOT DELETE** your old account. Please add a new account and set the "Pay into this fund" amount to $0 in the old account. If you are unsure, please email support.

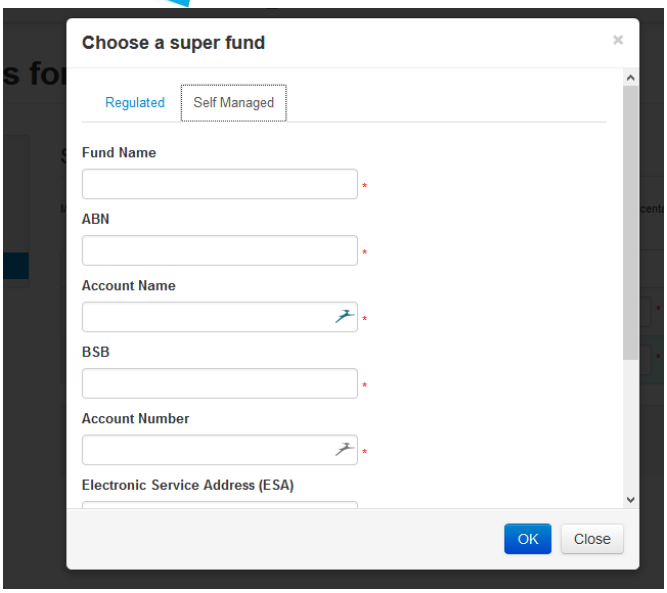
3. To add your Superannuation fund, click on "Add Super Fund". New fields will appear below your current fun details. Click on "Choose Super Fund".




4. The dialogue box below will open. If the Superannuation Fund is a Regulated public fund enter the **Name**, **ABN**, or **Unique Superannuation Identifier** (USI) of the required fund and click "Search". Choose your correct fund from the selection available.




5. Next enter your superannuation fund membership number and **Save**.
6. For **Self-Managed Superannuation Funds** click on the "Self-Managed" Tab in the above dialogue box. The below application will open. Enter details into each section. Fields with asterisks are mandatory. Click OK.

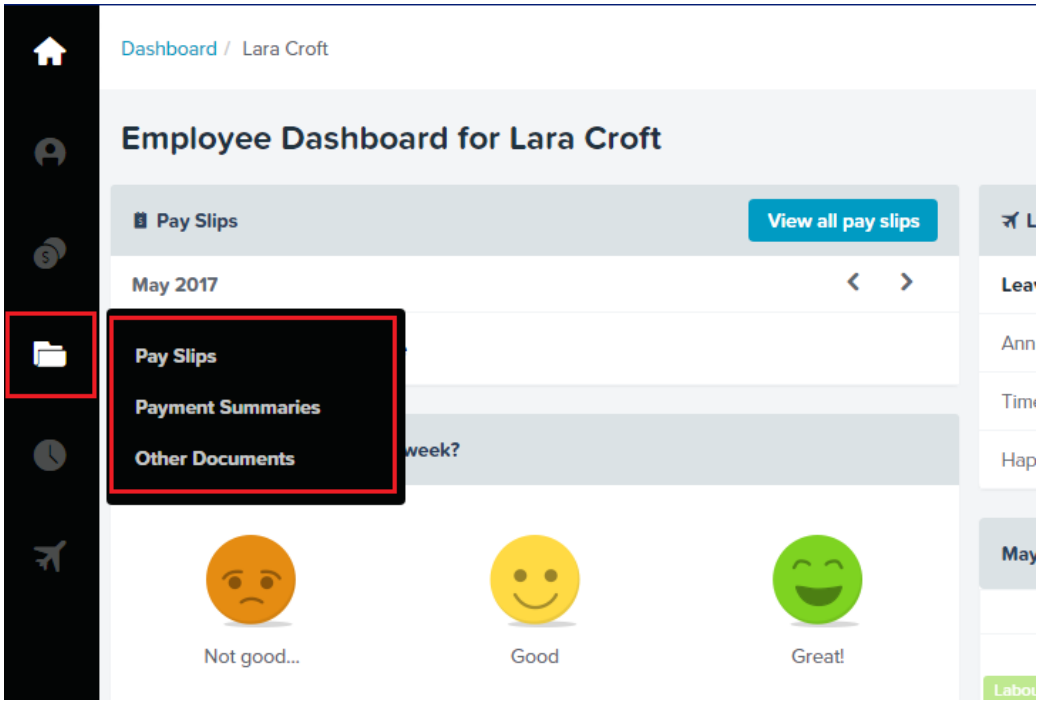



7. Enter the amount of superannuation you would like to allocate to this account and click “Save”

## DOCUMENTS

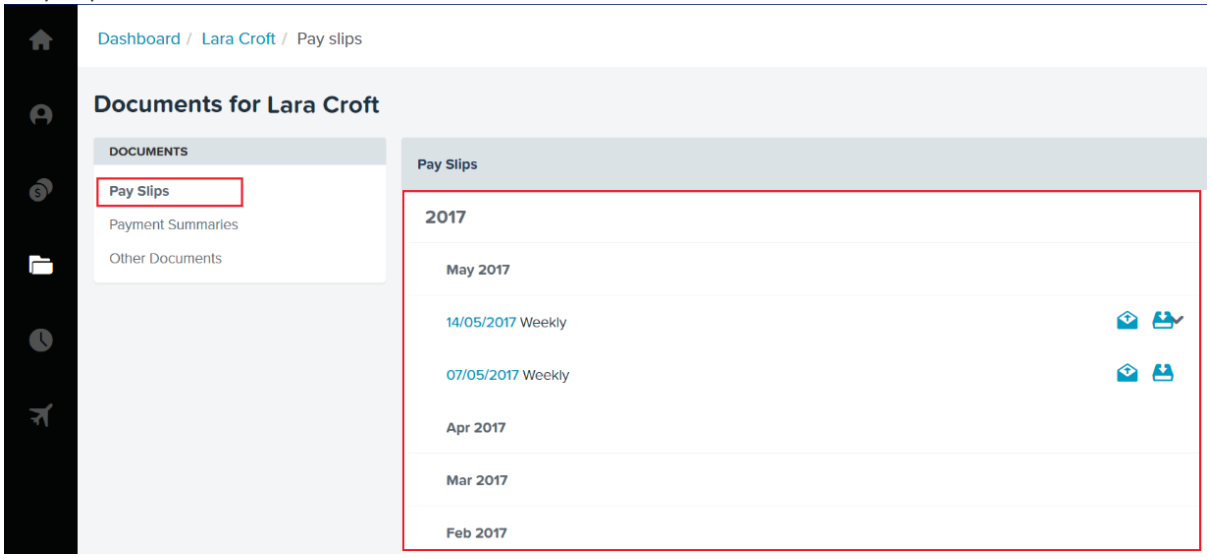
**IMPORTANT NOTE**: This screen may contain documents added by both yourself and your employer. We suggest you access this page on a regular basis to ensure you are up to date with documents attached by your employer.

1. Click on the "**Documents**" tab on the left-hand navigation menu.



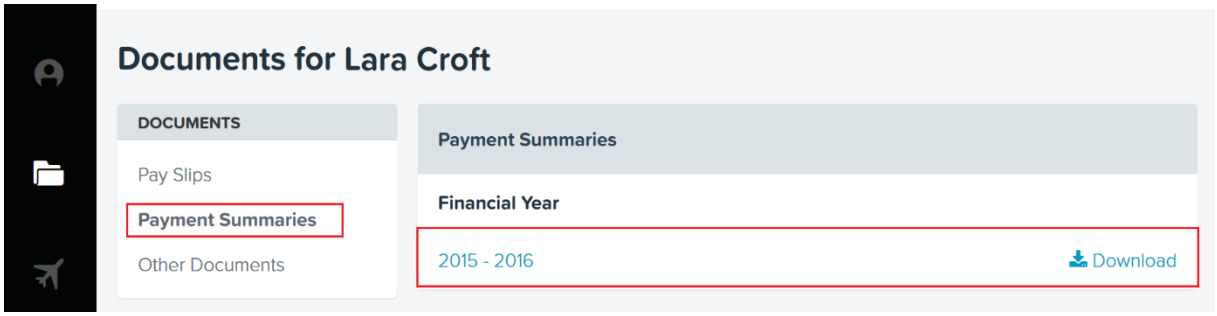

2. This will open a picklist for the following, Payslips, Payments Summaries and Other Documents

## Payslips



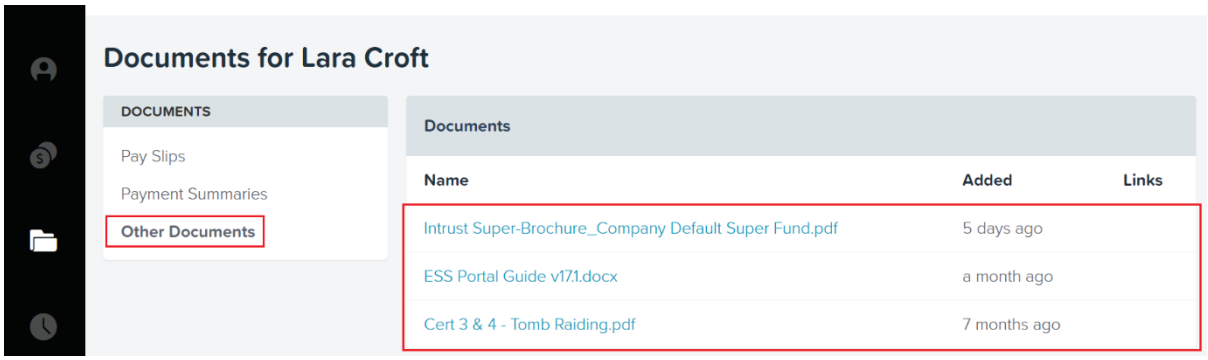

a) This screen will allow you to access all your personal payslips sent by TouchPoint HCM Solutions.
b) Payslips are sorted by Year and Month. Click on the year or month required to access all payslips paid in that particular time frame.
c) Click on the pay period date for the payslips required.

## Payment Summaries




a) This screen will allow you to access and download all payment summaries sent to you by TouchPoint HCM Solutions.
b) Click on the required year to view and print your payment summary or click on the download tab to save to your own device.

## Other Documents

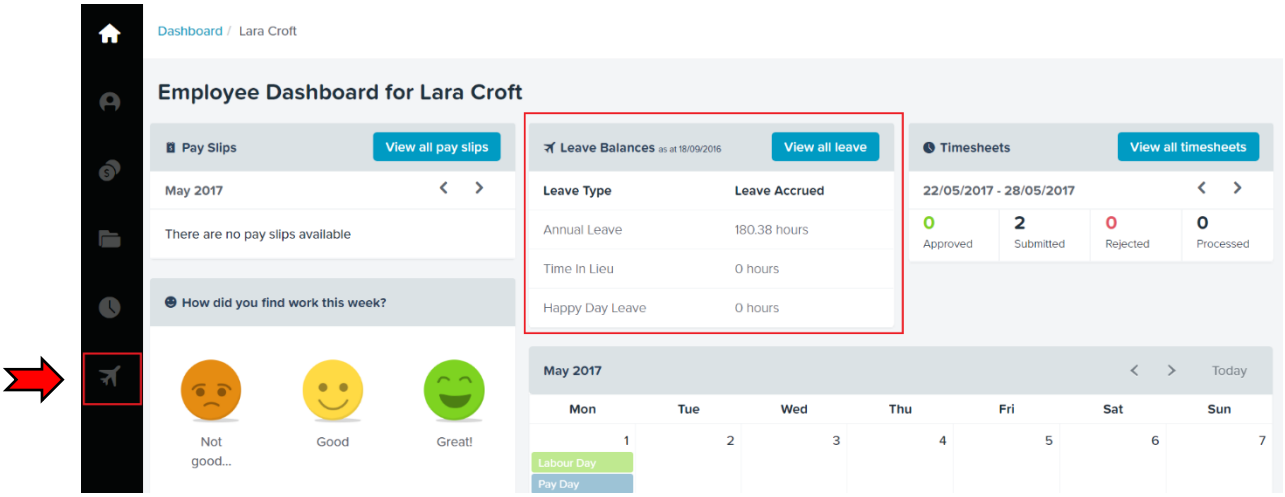



a) This screen will give you access to documents that have been attached to your file; this may include Qualifications, Licenses or Notices from your Employer. It will display the name of the document, when the document was added, and any external links attached to the document.
b) Click on the document you wish to access and either open the file or save it to your device.

# LEAVE

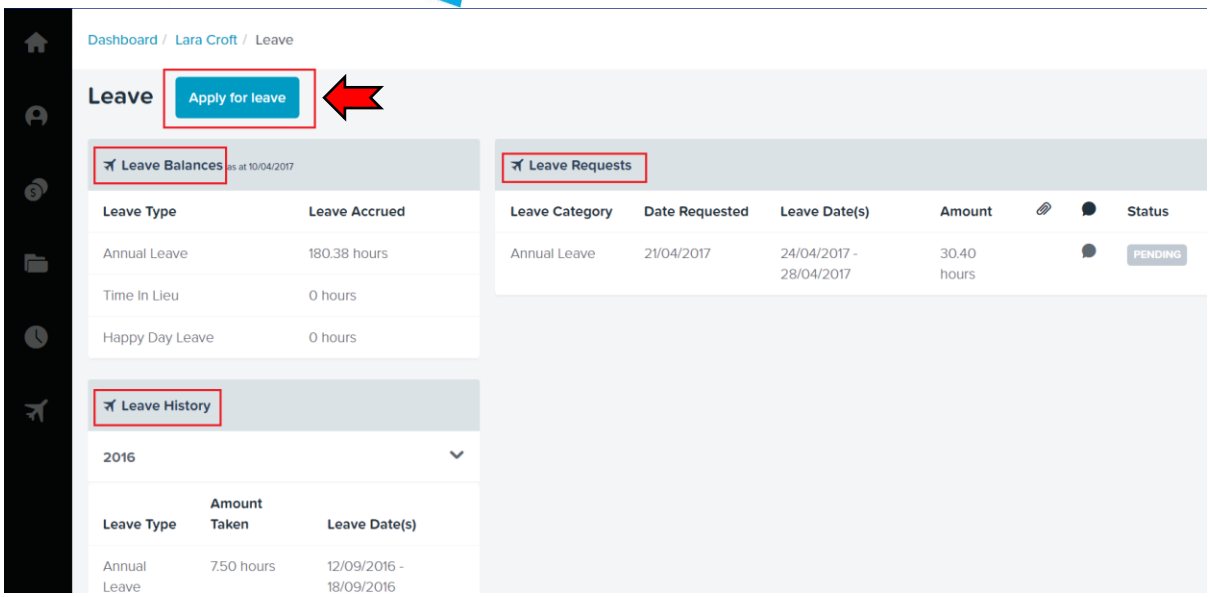
## Balances and Applying for Leave

1. The Dashboard homepage will display a snap-shot of the type of leave you are entitled to and how much leave you have accrued.
2. To apply for leave, click the **Leave** tab from the navigation menu.




3. The follow screen will be displayed, from here you can view your:
   - Leave Balances
   - Leave Requests
   - Leave History

4. To apply for leave, click "**Apply for Leave**"

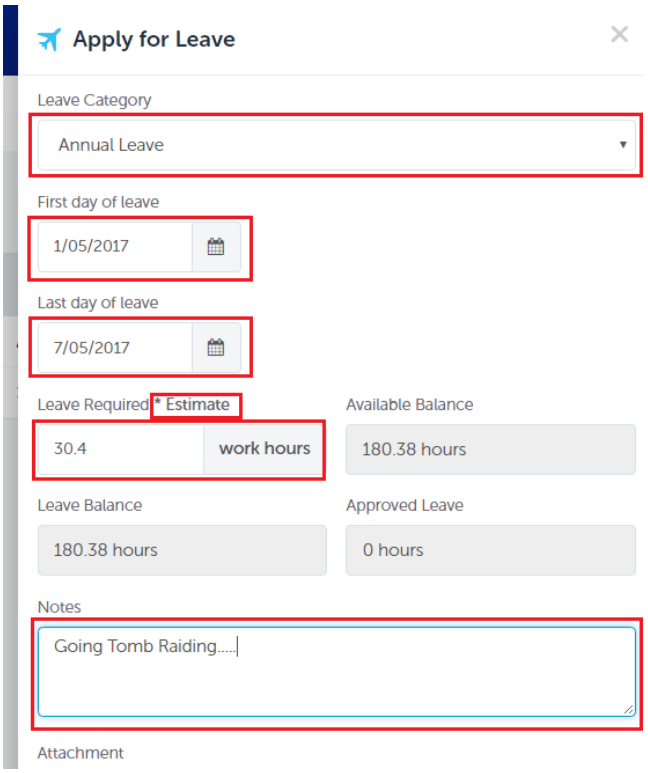



5. The Apply for Leave screen will appear as a pop-out on the right-hand side. First, select the type of leave you wish to apply for from the available list in the **Leave Category** E.g. Annual Leave, Personal/Carers Leave, Leave Without Pay etc. (Sick Leave is now called Personal Leave).

6. A new table now appears with your Leave Balance total, any Approved leave that has not yet been used and your Available Leave Balance. (Leave Balance – Approved Leave = Available Balance.)

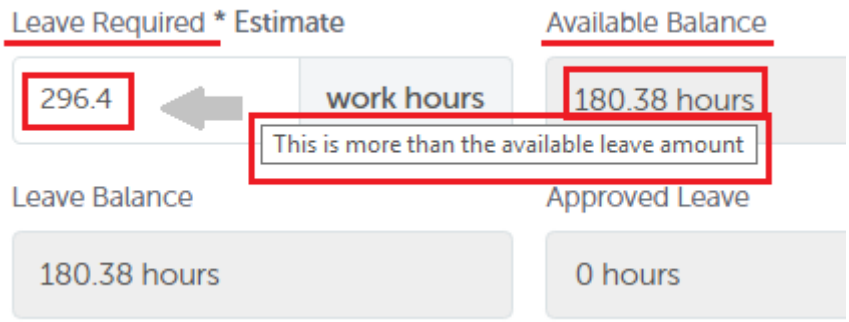
7. Enter the date for the **First Day of Leave** (the date your leave is to start) by clicking on the calendar and choosing the correct date.

8. Do the same for the **Last Day of Leave** (the date your leave will end).




9. The "**Leave Required**" box will automatically populate the number of hours required for your leave from start to finish. (You can view details of this calculation by hovering your mouse over the word "***Estimate**"). You can change these hours if you plan to work half days during your leave period.

10. Please check the amount of **Leave Required against your Available Balance**. Hover your mouse over the Leave Required box to verify you have enough leave for the request. If you have insufficient leave a text box field will be displayed. Review your request and adjust your requested hours accordingly. If you apply for leave for which you have an insufficient balance, the remainder of the request will be processed as Leave without Pay.




11. In the "**Notes**" section, enter the reason you are taking leave. E.g. Family Time, Sick with Flu, Holidays or other notes relevant to your leave request. **Note:** Leave requests cannot be submitted without a note.

12. The "**Attachments**" section is where you can attach any files or documents relevant to your leave request, e.g. Medical Certificates for Personal/Carers Leave. Click the "Add" tab and attach your file.

13. Once you have completed your application click "**Submit Request**"

14. A request email will be sent to your manager who will then either approve or decline your request.

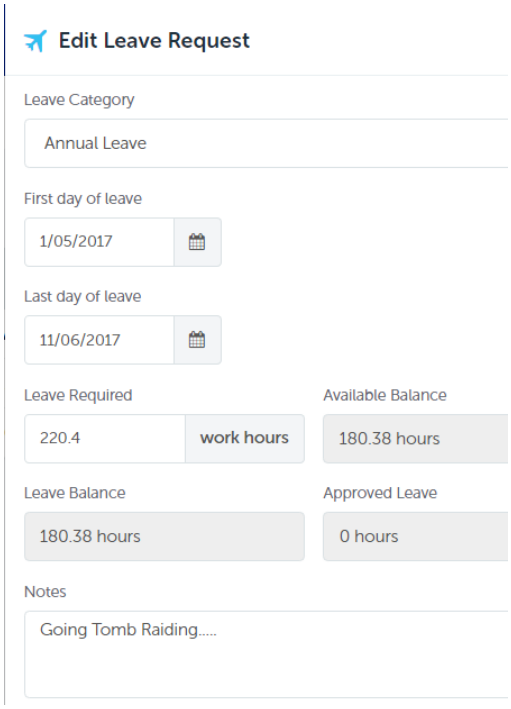
15. Once your manager has approved or declined your request, an email will then be sent to you advising you of your manager's decision.

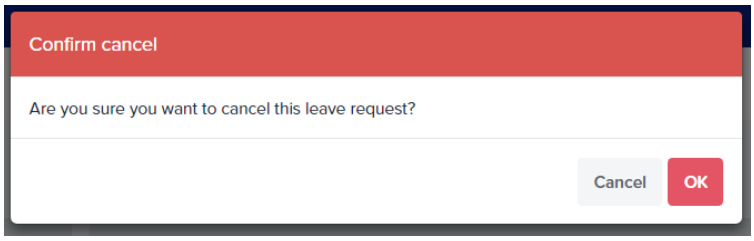
**IMPORTANT**: Please check your request before submitting, ensuring that you have entered the correct dates and there is enough available leave for the period being requested. Your Annual Leave and Personal/Carers Leave accrual should NEVER be in negative unless first approved by your manager or supervisor.

## Edit or Cancel Leave Request

1. From your ESS Portal Dashboard click the "**Leave**" tab on the navigation menu on the left side of the page.
2. The Leave screen will open displaying Leave Balances (all leave balances accrued), Leave Requests (all leave requests either pending, declined, or approved for future date) and Leave History (all past approved leave requests).
3. In the "**Leave Requests**" section, choose the submitted request you wish to edit or cancel. At the far right, select the appropriate icon for your action; (**Edit**) or (**Cancel**)

4. To edit, click the "**Edit**" icon and the application for the leave request will re-open allowing you to edit as required. An email will be sent to your manager advising them of the changes made.
5. To cancel, click the "**Cancel**" icon. A dialogue box will open asking if you are sure you want to cancel the request, click "Yes". An email will be sent to your manager advising of the request cancellation.

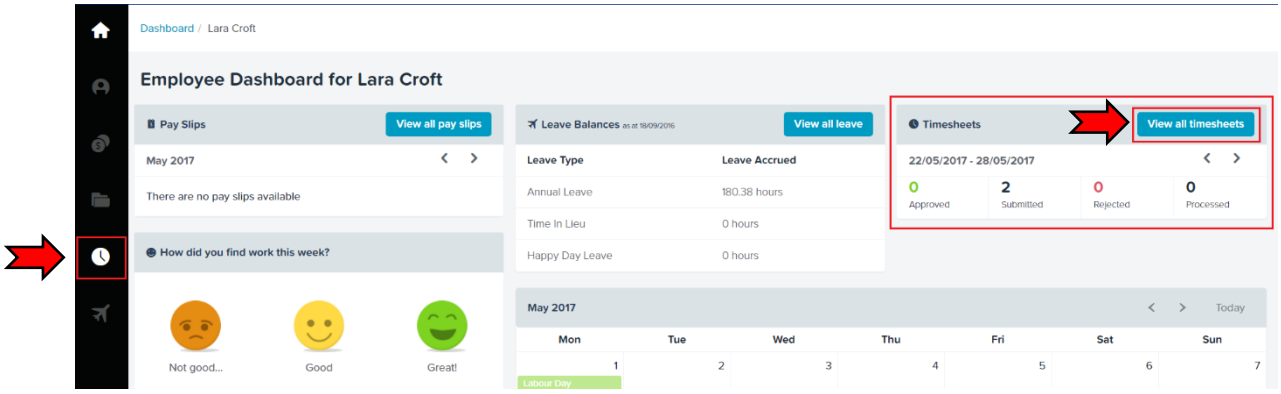


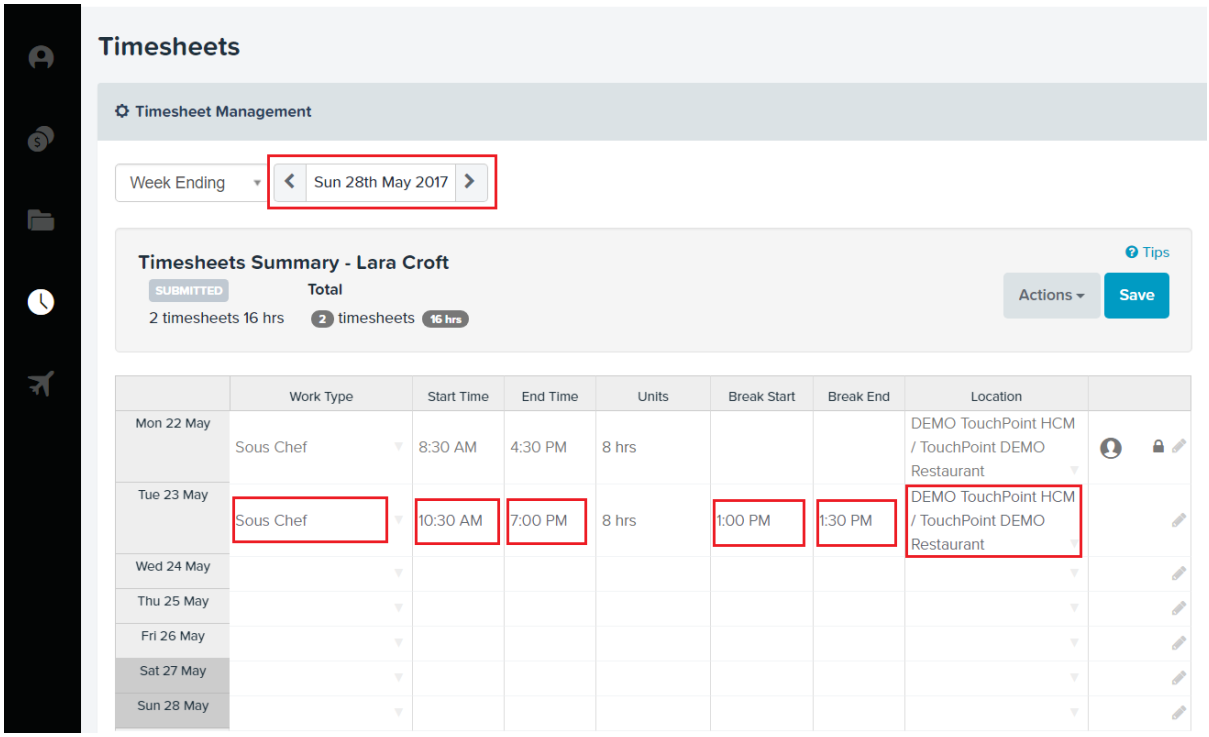

# TIMESHEETS

**IMPORTANT NOTES**: If a manager creates timesheets on your behalf, or an iPad Timekeeper has been installed for employee use, then please disregard the Timesheet steps below.

1. From the Portal Dashboard you will see a snapshot of your Timesheets current week. Click on "**Timesheets**" from the Navigation Menu on the left, or click "**View all Timesheets**".



The Timesheet Management screen will automatically open.




3. Make sure you select the correct corresponding **week (or fortnight) ending date**, and enter the following:

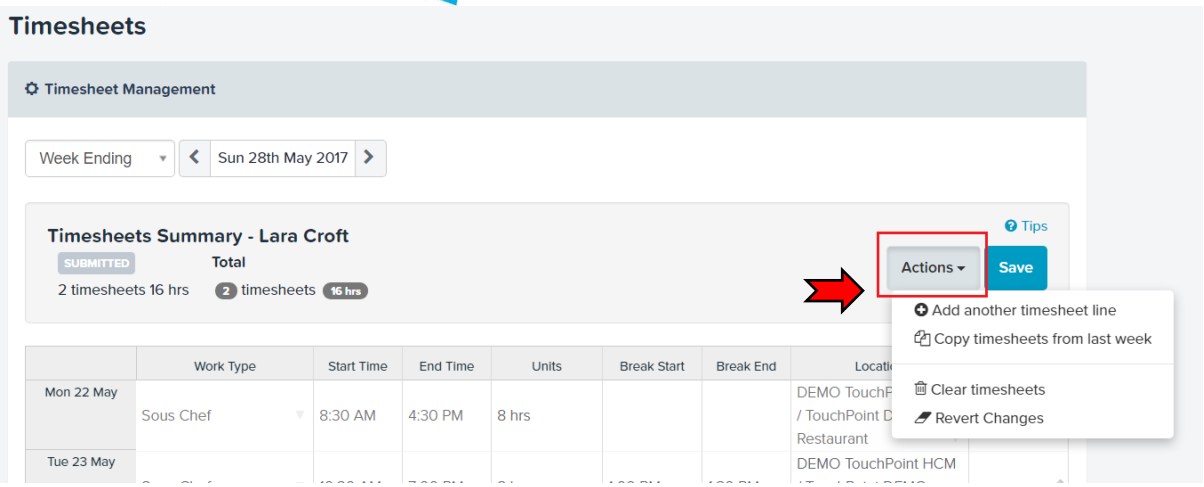
   a) ***Work Type** – Choose from pick list the type of work performed for that shift e.g. Delivery Driver or Bartender.
   b) ***Start Time** – Time shift was started. (Time entered as 9a will be automatically changed to 9.00am or time entered as 530p will be automatically changed to 5.30pm, 24 Hour clock time is also an option).
   c) ***End Time** – Time shift was completed.
   d) **Break Start** – Time break started.
   e) **Break End** – Time break ended.
   f) ***Location** – Choose from pick list of locations allocated to you.

4. Once completed click the "**Save**" tab.

**IMPORTANT NOTE**: When entering timesheets – If Work Type is not specified a default work type will be allocated during processing. If Location is not specified a default location will be allocated during processing. In some cases, a timesheet will not save unless a Work Type and Location are specified.

## Actions Tab

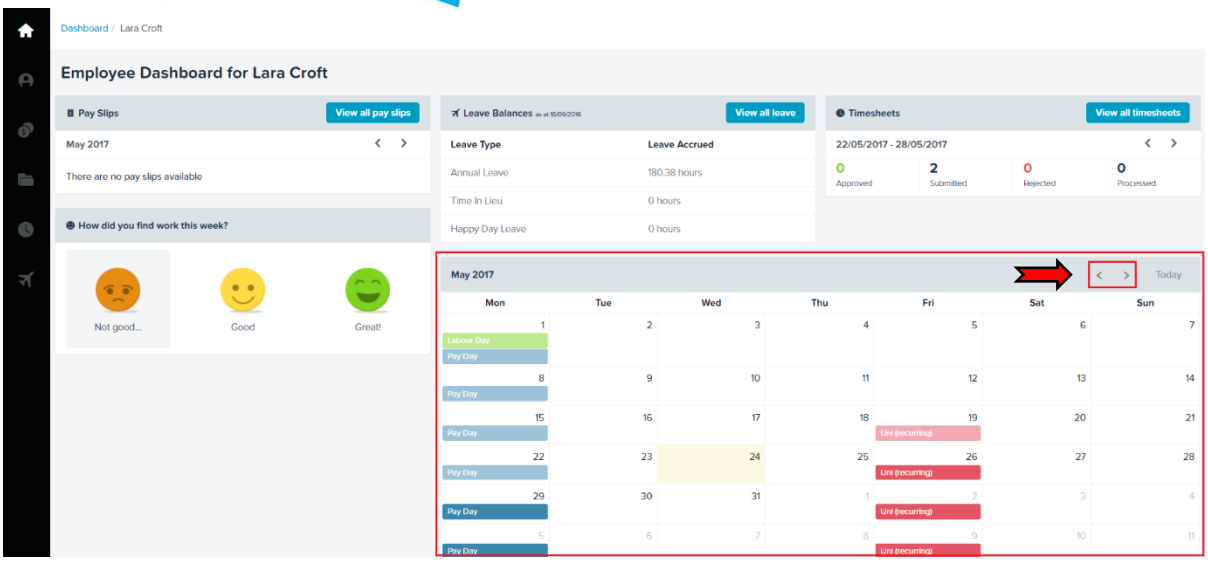
Clicking on the '**Actions**' button provides several additional features:



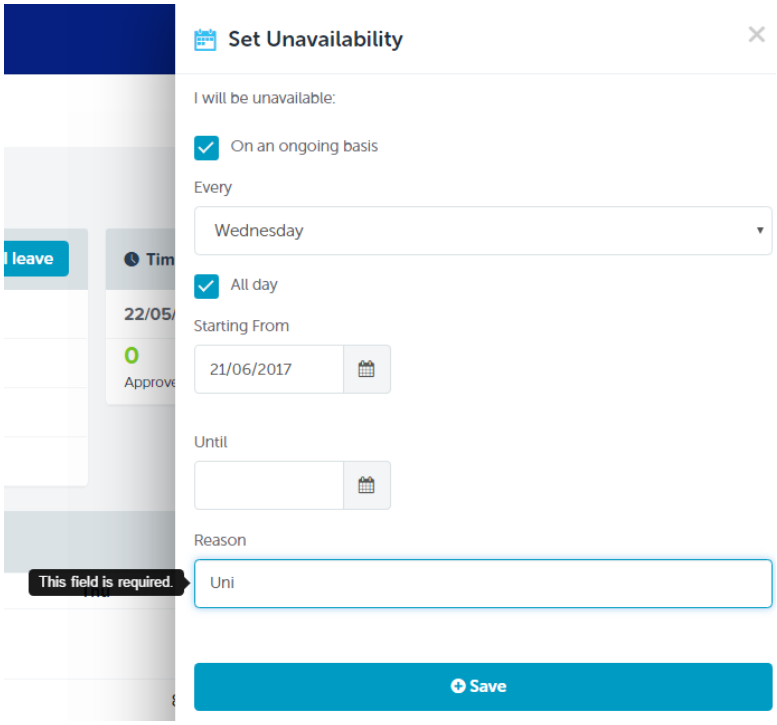

- **Add another timesheet line**: If an employee works multiple Shifts, Work Types or Locations for the **one day**, this action will enable the user to add another line for that day.
- **Copy timesheets from last week:** This will pre-fill the timesheets for this period with the same timesheets that were entered in the last period. The timesheets may then be modified as required before clicking **Save**.
- **Clear timesheets:** This will clear **all** the timesheets. Note: Approved/Processed/Rejected timesheets are read-only and may not be cleared.
- **Revert changes:** This will reload the timesheets for this period, discarding any changes made since the last save.

## CALENDAR

1. The Calendar is viewable from the Dashboard Home screen. Here you can view your upcoming shifts, approved leave request, and unavailability dates. Use the arrows to change the month.




2. To make yourself unavailable, click on a day in the calendar. This will open the "Set Unavailability" dialogue box. Enter the details required and click "Save". **NOTE: This feature may not be available to some employees. Unavailability is <u>different from leave request.</u> This is for frequent, reoccurring unavailable dates e.g. University on Tuesday & Thursday etc.**

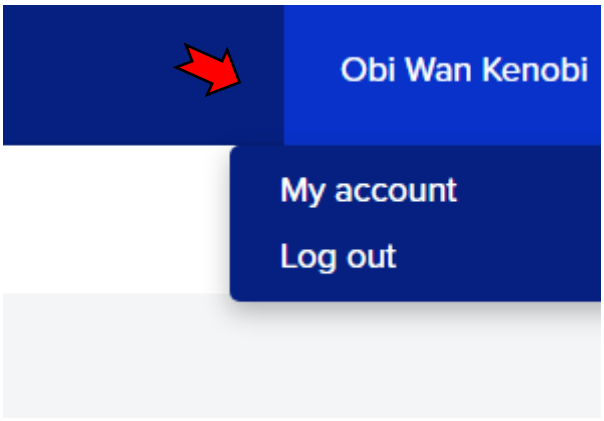



3. You can edit existing entries by clicking on the specific entry you want to edit.

## ACCOUNT DETAILS & LOG OUT

In the top right hand corner of the dashboard screen you will find your name.

1. Click on the arrowhead to the right of your name which will open a pick list. This is where you log out once you have completed using the ESS Portal. We strongly recommend that you ALWAYS log out after you have finished using your portal.




2. Click on the "My Account" tab. This will open the account details screen where you have access to change your username (email address) and your password.

**IMPORTANT NOTES: For security reasons, we suggest you adhere to the following rules:**

**a) Change your password frequently.**
**b) Do not allow anyone to know your password.**
**c) Do not allow anyone access to your ESS Portal.**

## LAST NOTES

1. Please follow the support steps in this guide for prompt service.

2. It is essential that you use the ESS Portal to Request Leave and (where applicable) enter your Timesheets as described in this guide. Failure to follow the steps outlined may cause delays in wages being deposited to your allocated account.

3. It is now YOUR responsibility to ensure your details are up to date at all times.

4. If you have any questions regarding the ESS Portal or our services, please do not hesitate to contact our support team at support@TouchPointHCM.com.au